



# Department of Management

## Lean Facilitator Training Design Event

### Lean Team

July 30<sup>th</sup> – August 2<sup>nd</sup>, 2013

# The Opportunity

**Marcia Tope**  
**Iowa Department of Management**  
**Lean Enterprise Administrator**



# Lean Team



**Team Members:** Marcia Tope, Dept of Management; Bill Carlson, Dept of Public Defense; Sara Throener, Dept of Inspections and Appeals; Michelle Wilson, Dept of Natural Resources; Melissa Nation, Dept of Human Services; Kate Murphy, Dept of Transportation; Laura Scheffert, Dept of Corrections; Maria Silvers, Pella Corporation; Shan Sasser, Dept on Aging; Ruth Thompson, Dept on Aging

**Facilitators:** Matt Haynes and Susan Godwin

# Scope

Melissa

Design standardized training components and corresponding competency expectations for new Lean facilitators from the point a new facilitator is identified in an agency until they are able to independently facilitate, to include both “classroom” and experiential aspects, competency tracking, and requirements for mentor oversight.

# Goal

Maria

1. Finalize training components and be ready for implementation by January 1, 2014.

# Objectives

Bill

1. Define and map standardized training components for Design Kaizen, Business Kaizen, 5S, and Value Stream Mapping facilitation.
2. Document training components and corresponding competency expectations to use for reference and training staff.
3. Define a method of assessing and monitoring required competencies from the start of training until readiness for independent facilitation.
4. Structure and interface training components in a way that promotes expeditious, efficient scheduling.

# Objectives

## Bill

5. Develop recommendations to address challenging training logistics (i.e., who will provide training en total or in part, how to best address lulls/delays in scheduled Lean Events, etc.).
6. Develop a plan to assess current capacity and competency levels of facilitators, to include the number of agencies involved.

# Kaizen Methodology

Susan

- Clear objectives
- Team process
- Tight focus on time
- Quick & simple
- Necessary resources immediately available
- Immediate results (new process designed by end of week)



# Trends

Laura

- Government is results focused
- Collaboration across agencies and between public/private
- Movement toward standardization
- Increased customer focus
- Push for IA to stay competitive with other states
- Political environment – frequently changing leadership
- Less face to face and more electronic exchanges

# SWOT

Sara

S = STRENGTHS

W = WEAKNESSES

O = OPPORTUNITIES

T = THREATS

LEAN

State of Iowa  
Continuous Improvement

# Examples of Identified Strengths

Melissa

- Culture of improvement.
- Lean is promoted throughout government agencies
- DOM supports government leaders to utilize Lean
- Have reference materials and tools in place now that we can build upon
- There is collaboration between public and private sectors
- There is a pool of facilitators
- There have been successful events
- Many agencies are supportive and are involved



# Examples of Identified Weaknesses

Melissa

- Follow through after events is a struggle.
- Lack of built in sustainability
- Limited dedicated funding across government
- Small facilitator pool, not enough to meet demand
- Lack of working/structured system to centrally locate documents and reference materials
- Lack of standardized method to prioritize/select projects
- Lack of standardization of Lean facilitation
- Lack of Lean awareness, including with mid-level workers that do the work day in and day out



# Examples of Identified Opportunities

Kate

- Expand public/private partnerships; utilize as resources
- Capitalize on Lean due to funding issues – create efficiencies
- Build capacity (facilitators)
- Take advantage of facilitator skills for teaching, assisting in parts of events, mentoring, etc.
- Provide training to describe the benefits of Lean
- Spread Lean culture across agencies
- On-going DOM support
- Sharing successes of events

# Examples of Identified Threats

Kate

- Lack of funding
- Resistance to change
- Changing/increasing competing priorities
- Capacity vs demand
- Facilitator balancing responsibilities

# Examples of Brainstorming Ideas

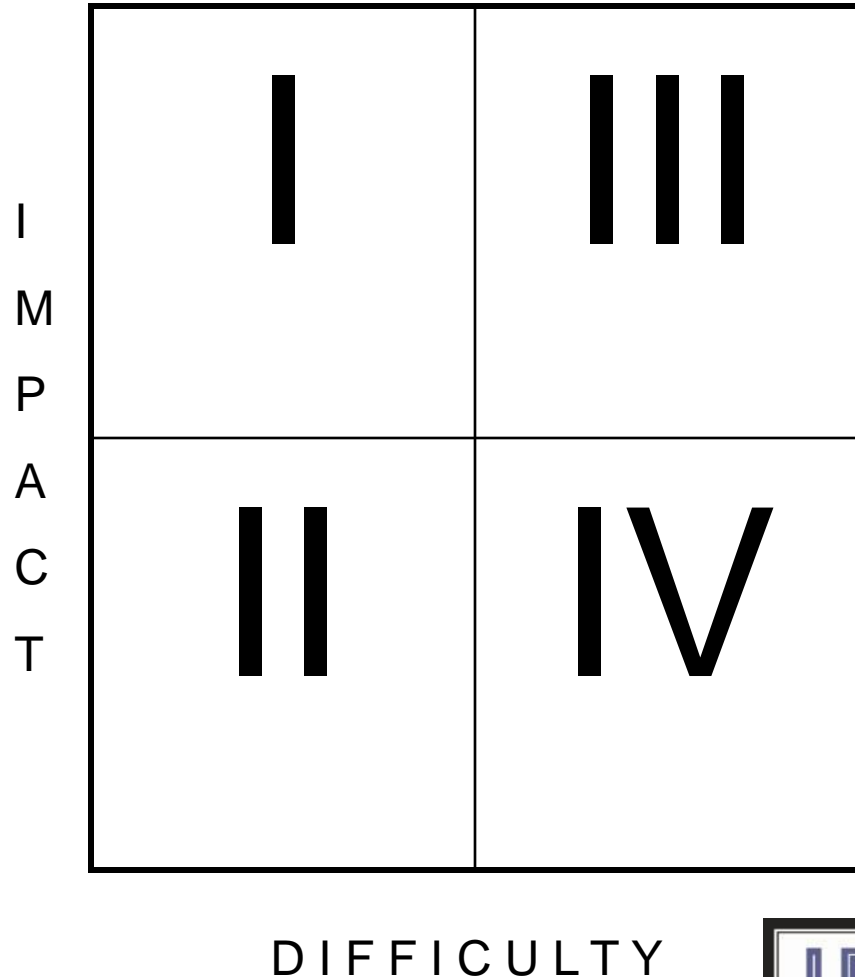
## Bill

- Develop core training for all to go through; specific training for each of the strategies
- Define roles and expectations
- Develop mentor program
- Utilize public/private partnerships
- Centralized storage of training, templates, tips, etc.
- Certification is competency-based
- Continuing education for facilitators
- Utilize facilitators/mentors to train

# De-selection Process

Sara

- Identifies
  - Impact to customer
  - Difficulty implementing
- Helps to rate/rank solutions to resolve issues while identifying ease of implementation





# New Process

Marcia



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# Homework

Kate

Item Description	Person Responsible	Due Date	Progress/Comments
Evaluation tool developed for facilitator to use to determine team lead to agency head involvement (assessment of team leader/agency involvement in event)	Laura, Core Module	1/1/2014	
Develop standard training including developing/ determining the following: standard process (SOP); who will train (recs); "tests" to show proficiency; consistent message on Lean and Lean events for facilitator use; pre-reading materials (glossary, etc.); facilitator checklist (what's needed, tools, consideration of facilitator); consistent but flexible materials - where can agencies have flexibility; tool templates, including an example; assure voice of the customer is included; logistical guidelines	Kate, VSM Module	SOP at 60 day; balance of trng by 1/1/14	
Develop standard guidelines for what info is visually displayed/shared following events	Michelle	Discuss at 30 day	
Self assessment conducted regarding the 4 Strategies. Utilize the data from Marcia's recent survey.	Marcia/Bill	60 days	
Standardize data analysis method and tool	Bill	1/1/2014	



# Team Member Experience

**Marcia**

**Maria**

# Comments

## Matt Haynes

Lean Facilitator, Department of Human Services, Bureau of QI



**We welcome your questions and  
comments!**

